and Flourish in a Changing Environment Where You Are the Headlights

Moving Your Work-style From
Assessing the Past to Informing on the Future

"To keep a lamp burning, we have to keep putting oil in it."

Mother Teresa

Dr. Brad Lafferty
Dr Chris Lafferty

We work for Commands with diminishing

What we are asked to work with often doesn’t meet o

Sometimes our Commands view our usefulness as

Sometimes we feel our unit’s mission isn’t being ta

"It appears to be Shiva, manifesting himself as Lord of Destruction, but why he's at CENTCOM on a Thursday night is beyond me. It's not even his AOR!"

And in today's world, anything can happen!

THE UNITED STATES ARMY
S.C.U.T.R.
We are transforming today's most powerful Army in the world from a Cold War Legacy Force to an Objective Force with early entry capabilities that can operate jointly, without access to fixed forward bases and still have the power to slug it out and win campaigns decisively. The S.C.U.T.R. will help us achieve those goals.
S.C.U.T.R
Strategic - Commuting - Undercover
Tactical - Recon
PATROL
DEPLOYMENT
FOLDS INTO LIGHTWEIGHT FIELD PACK!
RECON

of the ideas our Commands come up with are a little s

And, of course, there are our daily battles with securi

Still, our job is to tell it like we see it...

Most likely you view your current work environment like this

To put out those fires, you need to get some co

And the way we do that is to communicate to be he

So how do you prevent this ?

By embracing change, and using tools and style to communicate for agile analysis.

Agenda:
The Three Ps

- Preaching
- Planning
- Presentation

Problem

- Senior leaders are using after action lessons learned to fix problems in real time.
- Senior leadership is depending on analysts to glean the significant issues in quick time, thus making strategy decisions.
- Senior leadership wants to put the majority of their power and time in cutting the response time to solve a problem and bring a solution to the field.

Why this is a problem:

- This puts the lessons learned analyst in a position to significantly influence the actions of superiors and to directly affect the conflict itself.
- After action analysts are rarely trained in concise writing or in trend analysis. The result is that they are besieged by information and have difficulty identifying the significant trend, the fulcrum to change that trend, and communicating succinctly what the issues are.
- The result is that focus and time are lost, superiors don’t get the information needed in

Well, aren't I doing that?

- Most likely, *you* are selecting the hot issues based on your past experience.
- Most likely, you are compiling or even conveying the information in a "report" format.

So what's wrong with that?

- Reports look back historically. We don't need history. We need analysis.
- History does not repeat itself - but it does rhyme.
- Events need to be selected based on current needs and assessments and not encumbered by past styles and formats.
- Reports take time to read and understand, and (heaven forbid) appreciate. *TIME* is the enemy. And everything that made you successful in the past is taking up your time.
- What is said (written) is not important. What is heard, understood and acted upon is.

OK, so you're saying that everything I learned in the past is a waste?

Everything you learned in the past brought you the experience needed to glean the facts and analyze a situation. You were hired because of this unique capability.

What is needed is a better way to find & communicate the information because the conditions (i.e., *Time*) have become compressed in the 21st Century.

Moving from a Historian to a Reporter

The Organizational World

And if you don't communicate -- focus on what is heard vice what you say -- this goes away

Because This is Changing

Working to Change This

You Are Here

Jacobs, 1997

Building the “Daily News”

- Lessons learned analysts need skill sets to operate in real time and communicate the information, thus compressing the decision process timeline.

- This workshop focuses on one method on how to improve this skill set: the “Daily News” approach.

- This method approaches all information from a newspaper perspective and relays the critical information via a “Front Page” style composed of a headline and follow-on text in bullet form. It covers selection of the lead story, writing style and analysis. It uses established (and time proven) journalistic style as a structure.

Benefits

- Standardized approach
- Reduced work by editing
- Increased communication of the important issues
- Reduced time in reporting

Think of It This Way…

Right now, you gather information, separate the wheat from the chaff, write a report and try to convey that information forward. In doing so you write “history” (accurate or not).

But you are **not** a historian; you’re in the newspaper business! The ideas you present to your superiors are nothing more than the “Front Page” of a

Building the Front Page

- People: Get the scoop: gather the information
- Process: Build the “Front Page”
- Format: Construct the

Building the Front Page

- People: Get the scoop: gather the information
- Process: Build the “Front Page”
- Format: Construct the pyramid

People: Get the Scoop

- MBWA: Weekly walk around, chat with your contacts and ask what's hot. If two people say something is hot - look into it.
- Use your underground network: Use the informal structure to gather your information. Use the formal process to work your information.
- Indebt people to you: Be a means for others' success. Use your position to spotlight people's good work. This will ID you as a contact to nurture. Never pass up the opportunity to earn a blue chip.

People: Get the Scoop

- Your network must survive if it is to support your superiors: Nurture your informal contacts first, your superiors second.

- Never trap a dog in a corner. Report bad information with a suggested solution or POC who is working the issue.

- Protect your sources. Divulge only with permission. Give them a heads up so they know when the info has been briefed to the higher ups – and to whom.

How to gather the information

Reports

Messages

People

Multiple points of what's hot

Build concept of Hot Issue

Build concept of Hot Issue

Scan the environment for which of your issues are the most time sensitive, hottest or will resolve long-term problems

Decide on your Lead Story

our final assessment of the key issues

*it's **always** under construction*

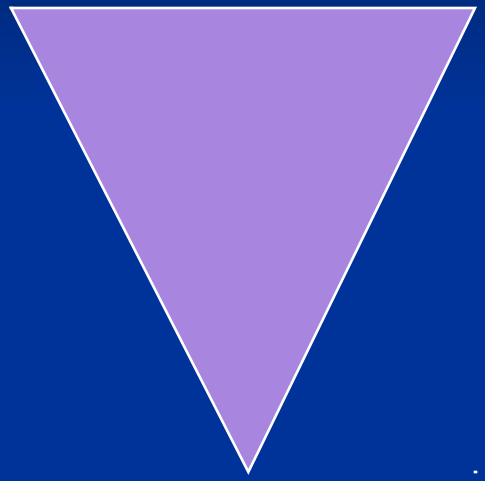
Building the Front Page

- People: Get the scoop:
  gather the information
- Process: Build the “Front Page”
- Format: Construct the pyramid

Process: Building the Front Page

- Don't grandstand: If there's no news, don't manufacture or embellish to fill space. Save your time and ammo for the hot issues.
- Determine the reality of the information: Have the rules changed or has the situation changed? If the rules changed, react. If the situation has changed, investigate and evaluate.

How *not* to convey the information



The buried lead

The mystery novel

The poem

Remember “How to gather the information”?

Process: Building the Front Page

Remember!

- Time is the enemy: React quickly when action must be taken immediately to avert disaster. Convey the information concisely. Take over 5 minutes and you're dead.

- The devil is in the details - dump the details. Hunt for accuracy, ignore precision. You are looking for trends. 30% accurate information is enough to make a decision.

How to convey the information

Your final assessment of the key issue

Multiple points of info of what's hot

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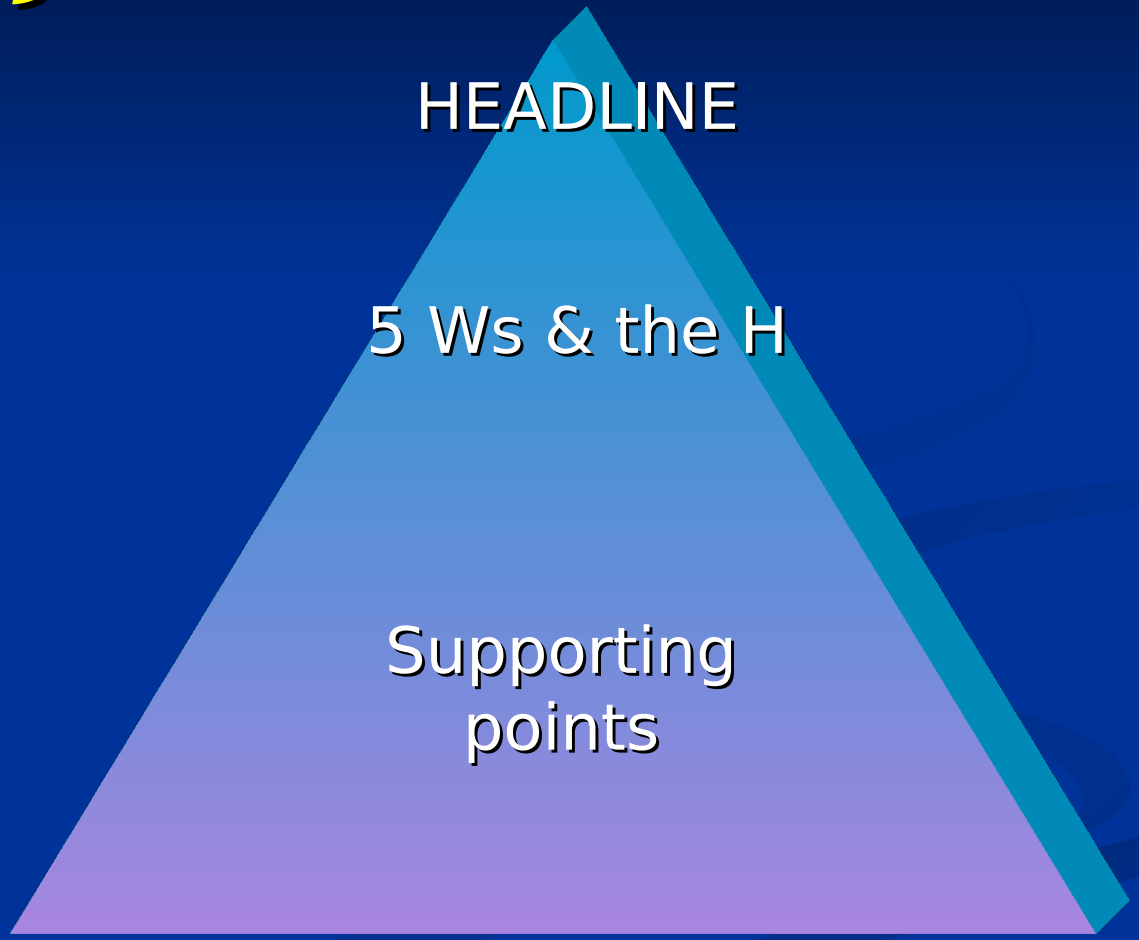
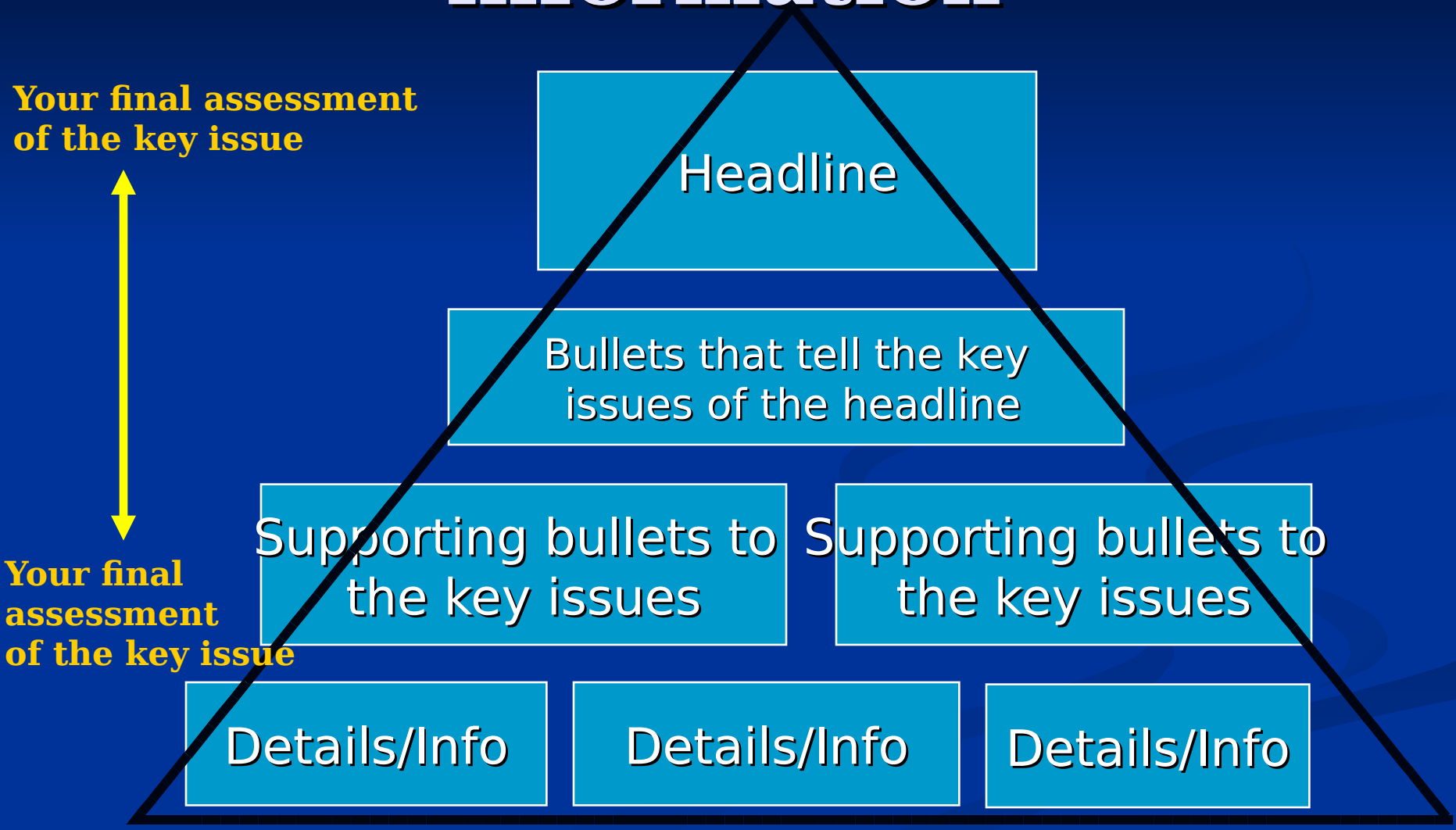


Building the Front Page

- People: Get the scoop:
  gather the information
- Process: Build the “Front Page”
- Format: Reconstruct the pyramid

How to convey the information


Your final assessment of the key issue
Your final assessment of the key issue
Headline
Bullets that tell the key issues of the headline
Supporting bullets to the key issues
Supporting bullets to the key issues
Details/Info
Details/Info
Details/Info

Example

- New IED cuts through armor, 3 die in Striker
  - Sat 38th Striker battalion ambushed in area Ohio
    - Lead Striker tripped photo sensor, 1 modified IED cut through armor
      - Spalling injured 4 in addition to 3 lost
  - New shaped charge cuts through existing armor
    - Charge is composed of a pipe mortar with a projectile that deforms into hardened object
  - Armor at risk; current defense is detection prior to detonation

5 Ws and H Covered

What

New IED Cuts through armor, 3 die in Striker

Where

When

Sat 38th Striker battalion ambushed in area [illegible]

Who

Lead Striker tripped photo sensor, 1 modified IED cut through armor

How

Spalling injured 4 in addition to 3 lost

New shaped charge cuts through existing armor

Why

Charge is composed of a pipe mortar with a projectile that deforms into 'Plasma Plug'

Armor at risk; current best defense is detection prior to detonation

Analysis: This is your assessment /recommendation of the best course of action or impact - The Bottom line!

Format: Reconstruct the Pyramid

- KISS: Three main points.
  - Notice that a newspaper usually has no more than three major stories on the front page. Rack and stack your top three critical lessons.
- Use headlines (sound bites) to transmit the information whenever possible. Use them as headers in longer lessons learned reports. 7 words max.
- 5 Ws and an H
  - Who, What, When, Where, Why, How

Format: Reconstruct the Pyramid

- Write for reading: What you mean is not important. What the receiver hears is. To avoid disconnects:
  - Active voice
  - Short, crisp sentences
  - Unambiguous language

- Just the facts, Ma'am. Just the facts: You have no hidden agenda; let your superiors ascribe meaning. Always tell the truth you found out. In cases with more than one truth, cover each separately.

- Keep the wheat / dump the chaff: If tactical information is not linked to a strategic action, ignore it.

So what are the next steps so we don't make the same…

Next Steps: Dry Run

"In any moment of decision, the best thing you can do is the right thing. The worst thing you can do is nothing".

- Theodore Roosevelt

Planning: A Facilitated Workshop

- Ideas are nice, but you have to put them into action to be able to say you have a grasp. In this exercise, the whole group will be divided into five smaller groups. After breaking into your assigned group, you'll notice you are working for a specific type of command.

- Education & Training
- Operational
- Doctrine and Planning
- Logistical
- Communications

Planning: A Facilitated Workshop

- As a whole group, we'll watch a video of a Civil War battle (Chamberlain at Little Round Top). Once in the breakout rooms, each group's job is to glean the pertinent information from the video example, build a "Front Page," and brief it to the reassembled group.
  - Take notes on what is important (remember: of importance to your command, items they will want to address before the next battle). Target your analysis to the needs of that specific command (i.e., what is important to them?).
- You'll have 10 min to view the video, 45 minutes to produce your front page, and 5 minutes to present your information to the reconvened group. The "Pull-it-sir Prize" will be awarded to the clearest targeted assessment conveyed in the most concise, focused manner.

Planning: A Facilitated Workshop

- Your Group Facilitators
  - Education & Training:
    - **Jake**: Former USAF, Intel, Strat Planning, Policy. J7 Ed & Training, CS After Action Deputy
  - Operational:
    - **Rusty**: Former USAF, Pilot, Ops Planning, Covert, Programmer CS After Action Writer, J7
  - Doctrine and Planning:
    - **Chris**: USAFR, Wartime Commander, Professor ICAF, Adjunct Professor GWU
  - Logistical:
    - **Brad**: Former USAF, Log Planner, War Planner, SAAS, CS After Action Vol. Lead, NRO Sr. Advisor
  - Communications:
    - **Colleen**: Former USA, Signal Corps, Wartime Commander, WHCA, GWU Center for Learning

Planning: A Facilitated Workshop

- Please break into the following groups and go to your reserved workroom/area
- Group 1 Room _____
- Group 2 Room _____
- Group 3 Room _____
- Group 4 Room _____
- Group 5 Room _____

Workshop

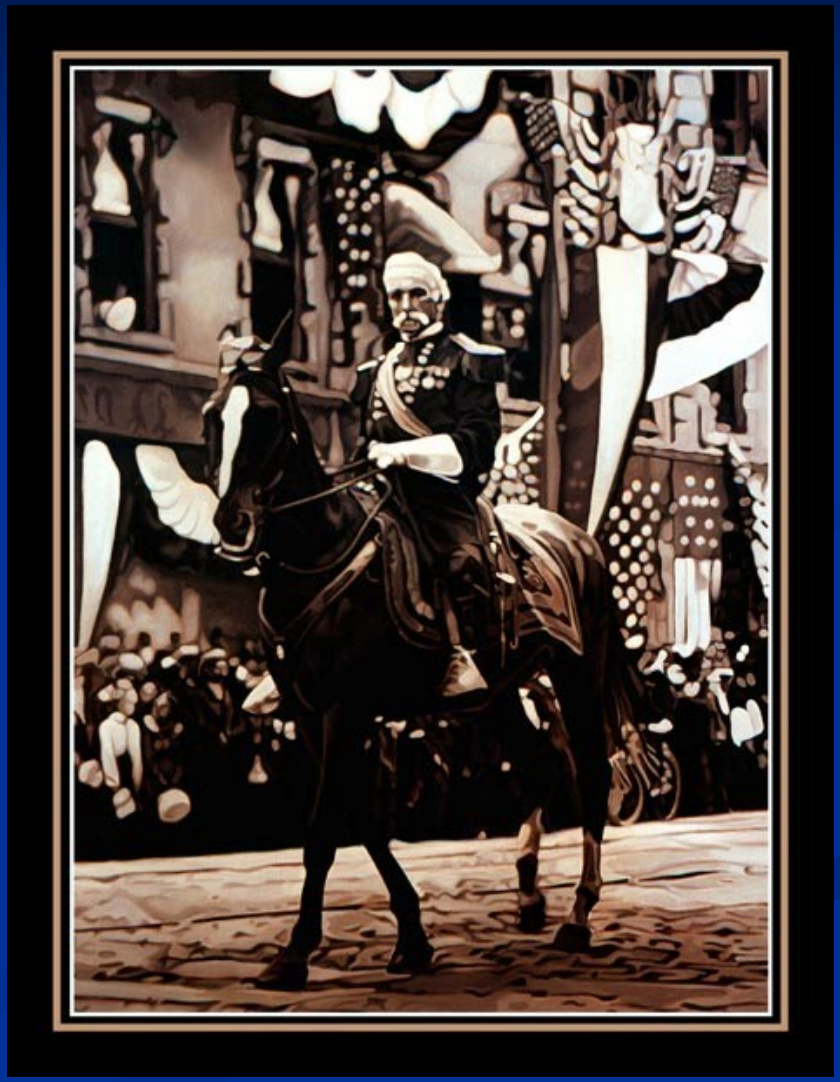
Before Little Roundtop:

"I truly believe that this battle is of the utmost importance, If any of you care to join us, I would be most appreciative."

After Little Roundtop:

"So what are you sitting down for?"

Joshua L. Chamberlain



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Outbrief

So what happened?
Next actions?
What did we learn?

At Best

Reporting lessons learned is often like juggling furniture. You're only finished when all the furniture is on the floor and nothing is moving.

At Worst

It’s knowing which end of the chainsaw to grab

How to Survive and Flourish in a Changing Environment
Where You Are the Headlights

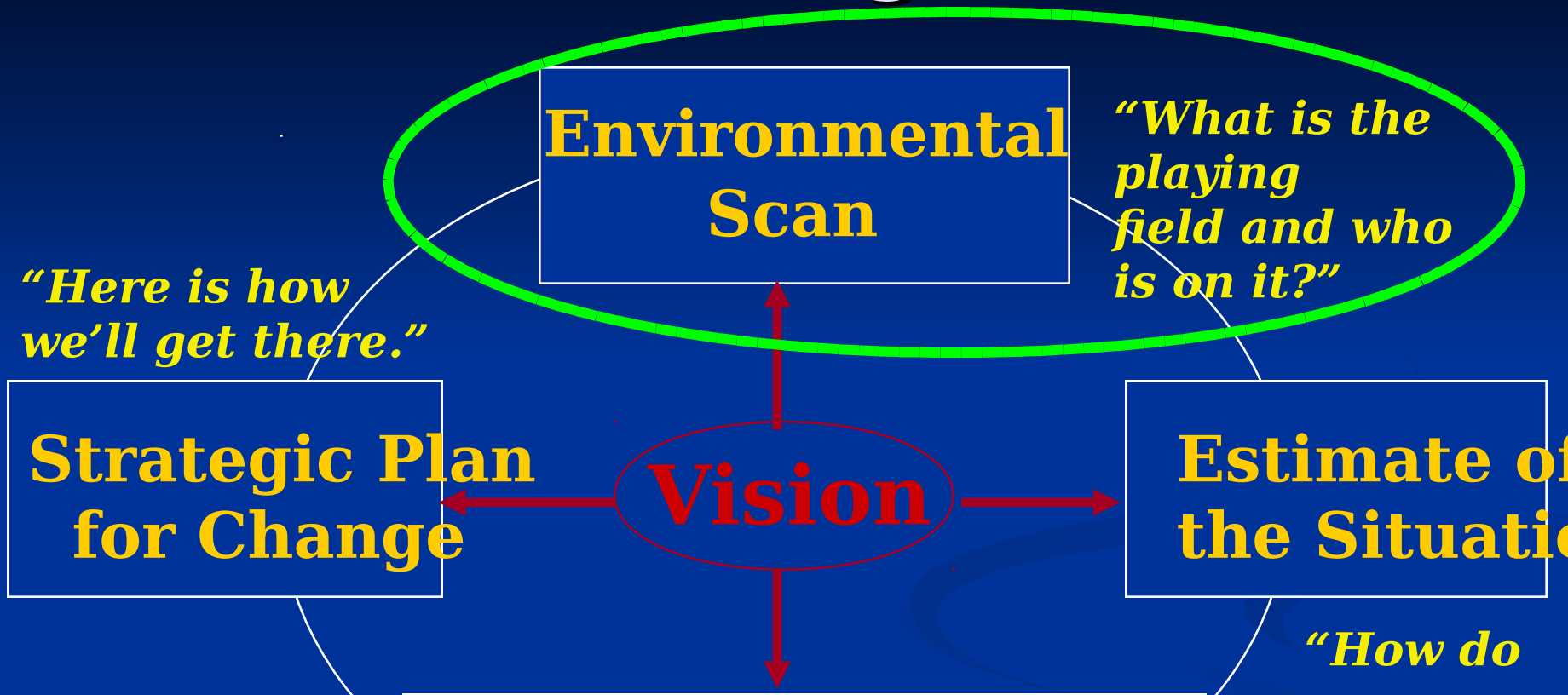
Moving Your Work-style From
Assessing the Past to Informing on the Future

Dr. Brad Lafferty, Dr Chris Lafferty

Colleen Duffy, Daniel W. (Jake) Jacobowitz, Larry ‘Rusty’ Schaefer

Backup Slides

The Visioning Process


Environmental Scan
"What is the playing field and who is on it?"
"Here is how we'll get there."
Strategic Plan for Change
Vision
Estimate of the Situatio
"How do we measure up?"
Mission: What is required for competitive advantage?
"Here is what we need to look like at the critical time."

Jacobs, 2000